

Chapter 16

Creating and Editing Codes

Codes are used frequently throughout Web Work. They are created to maintain consistency, save data entry time and offer quick access to all the information you need to oversee the management of your facility. This Chapter describes how to setup up and add codes to the Web Work system.

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1.1 Benefits of Using Codes

Using codes offers many benefits to the user including:

- Quick access to all the information you need to oversee the management of your facility,
- Speed and ease of data entry. Only a few keystrokes are needed to enter a name, identify a piece of equipment or even fill out an entire work order.
- Consistent entry of information allows for reliable identification, sorting and reporting.

The importance of the proper use of codes and consistency of data entry cannot be overemphasized.

2.1 Coding Formats

When creating codes it is important to put some careful thought into the system you will use to develop your coding structure:

For ease of use and readability it is recommended that you use upper case letters for codes and a combination of upper and lower case letters for descriptions. If possible keep codes as short as possible and the same length within each code type. The easier the coding format the easier it will be for the data entry personnel to enter the information into the system.



Codes must be either alpha or numeric identifiers or a combination of both. Use dashes to separate sections of a code rather than spaces.

3.1 Steps for Data Collection and Entry of Codes

These are the recommended steps for data collection and entry of codes:

1. Plan and design your data configurations and standards,
2. Collect the data for your codes,
3. Enter the information on data collection forms
4. Enter the data from the data collection forms into the Web Work system.

4.1 Changing Codes and Deleting codes

In the Web Work system code descriptions can be altered, codes can be deleted, but the code itself cannot be changed.

The most common reason for changing a code is because of data entry error. If a code has been entered incorrectly (AND NOT USED ON ANY WORK ORDER YET) then you would simply delete the old code and create a new one.

However, if the code has already been used problems can occur. Changing the meaning of established codes or deleting a code will affect the contents of not one, but every work order and maintenance record where the code has been used.

Therefore, when editing code lists it is essential to consider the global ramifications of changing the meaning of an existing code. In almost every instance it is better to add a new code instead of editing an existing old code.

For the most part codes are entered into the system in the module they are applicable to. Codes which are used in many modules can be added in a number of modules ie: priority codes can be added in the work order, PM, and Location modules.

5.1 Code Development By Module




The table below shows a list of the Web Work modules and the codes, which can be created in that module. You will note there are a few codes, which can be entered in a number of modules. (ie: Priority) No matter what module it is created in the code will be applicable for all modules where this field exists.

Module	Codes
Work Order Module	WO Types Priority Craft Crew Comp Remarks
Procedures	Procedure Codes Craft Crew Priority
PMs	Craft Crew Priority
Equipment	Equipment Codes Priority Equipment Type Equipment Status Sub-Types 1 – 5 Manufacturer
Locations	Location Codes Location Type Priority Location status
Inventory	Vendor Manufacturer Issue Unit Category Storeroom
Purchasing	PO status Accounts Vendor Purchase Unit Ship To/Bill To Terms
Receiving	Vendor
Labour	Craft Employee/Requester
Admin	Fault Codes GL/Acct Work Order Status

5.1.1. Work Order Type Codes

Web Work allows you to create different work order types based on the criteria you choose.

To add WO Types:

- Click on the **QUERY** button  beside the WO Type field while in the Work Order module to display a list of WO Types contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter a WO Type Code and Description in the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new WO Type code will appear in the WO Types listings.




Continue this process until all the work order types you wish to use are entered into the system.

Example Codes:	PM	Preventive Maintenance Work Order
	RM	Routine Maintenance
	SE	Special Event Work Order

5.1.2. Priority Codes

Priority Codes designate the priority level of a work order. Priority Codes are intended to be hierarchical by definition. They can be setup in the Work Order, Procedure, PMs, Equipment or Location modules.

To add Priority codes:

- Click on the **QUERY** button  beside the Priority field while in the Work Orders, PMs or Equipment modules to display a listing of Priority codes contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter a Priority Code and Description in the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new Priority code will appear in the Priority codes listings.




Continue this process until all priority codes you wish to use are entered into the system.

Example Codes:	P1	High Priority
	P2	Medium Priority

5.1.3. **Craft Codes**

Craft codes are used to designate the craft that will be assigned to a work order and the hourly rate for that craft. Craft codes can be setup in the Work Order, Procedures, PMs, or Labour module.

To add Craft Codes:

- Click on the **QUERY** button  beside the Craft field in the Work Order, Procedure, or PM modules to display a list of Crafts contained in the Web Work database. Click on the **NEW** button  at the bottom of the screen.
- Enter a Craft Code, Description and Rate in the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new Craft code will appear in the Craft listings.




Continue this process until all Craft Codes you wish to use are entered into the system.

Example Codes:	CARP	Carpentry
	PAIN	Paint
	PLUM	Plumbing

5.1.4. **Crew Codes**

Crew codes are used to designate the crew that will be assigned to a work order. Crew codes can be setup in the Work Order, Procedures or PMs modules.

To add Crew Codes:

- Click on the **QUERY** button  beside the Crew field in the Work Order, Procedure, or PM modules to display a list of Crews contained in the Web Work database. Click on the **NEW** button  at the bottom of the screen.
- Enter a Crew Code and Description into the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new Crew code will appear in the Crew listings.



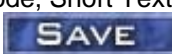
Continue this process until all Crew Codes you wish to use are entered into the system.

Example Codes:	NIG	Night
	DAY	Day
	GRA	Graveyard

5.1.5. Comp Remarks Code

Comp Remarks Codes are setup in the Work Order module.

To setup Comp Remarks Codes:

- Click on the **QUERY** button  beside the Comp Remarks field.
- Click on the **NEW** button  at the bottom of the screen.
- Enter a Comp Remark Code, Short Text and Description in the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new Comp Remarks code will appear in the Comp Remarks codes listings.

Continue this process until all priority codes you wish to use are entered into the system.

Example Codes:	JD	Job Done
	PC	Project Complete

5.1.6. Manager Codes

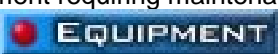
Manager's are not entered separately into the Web Work system. They are entered as employees. See the Labour module section for more information on adding Employee codes.

5.1.7. Procedure Codes

Procedure Codes provide details of the work to be done. To add procedure codes click on the **PROCEDURES** module  on the left hand side of the Web Work screen.

Example Codes:	MECH-01	Mechanical Procedure #1
	E1-01	Electrical Procedure #1
	HVAC-M	HVAC Monthly Procedure



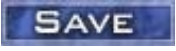
5.1.8. Equipment Codes

Equipment codes are used to identify each piece of equipment requiring maintenance, repairs or history. To add Equipment records click on the **EQUIPMENT** module  on the left hand side of the Web Work screen.

5.1.9. Equipment Type Codes

The Equipment Type further defines an asset. The EQ Type may be very useful when reporting on Assets and grouping them by EQ Type.

To add Equipment Type Codes:




- Click on the **QUERY** button  beside the Equipment Type field while in the Equipment module to display a listing of Equipment Types contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the EQ Type code and Description in the applicable fields.
- Click the **SAVE** button  at the bottom of the screen. The new Equipment type will appear in the EQ types listings.

Example Codes:	HVAC	Heat, Ventilation, Air Conditioning
	MOTR	Motor

5.1.10. Equipment Status Codes

The Equipment Status codes indicate the status of a piece of equipment.

To create Equipment Status Codes:

- Click on the **QUERY** button  beside the Status field while in Equipment Module.
- Click on the **NEW** button  at the bottom of the screen.
- Enter an Equipment Status Code and Description in the applicable fields.
- Click on the **SAVE** button  at the bottom of the screen. The new Equipment Status code will appear in the Status codes listings.




Continue this process until all priority codes you wish to use are entered into the system.

Example Codes:	P1	High Priority
	P2	Medium Priority

5.1.11. Sub Type Codes (1 – 5)

Equipment Sub-Type Codes are a way to further define and categorize assets.

To add a new Equipment Sub Type Code:

- Click on the **QUERY** button  beside the applicable Sub Type field while in the Equipment module to display a listing of that level of Sub Type codes in the Web Work database. (NOTE: there can be up to five different Sub Types for each piece of equipment)
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Equipment Sub Type Code and Description in the applicable fields.
- Click the **SAVE** button  at the bottom of the screen. The new Sub Type will appear in that Sub Types codes listings.




Example Codes: Equipment Type: Computers

Sub-Type 1: IBM
Sub-Type 2: Pentium
Sub-Type 3: Hard Drive
Sub-Type 4: Monitor
Sub-Type 5: Sound


5.1.12. Manufacturer Codes

Manufacturer's codes are the company that manufactures an asset or inventory item. Manufacturer's can be set up in the Equipment or Inventory modules. To add new Manufacturer's Codes:

To add Manufacturer Codes:




- Click on the QUERY button  beside the Manufacturer field while in the Equipment module to display a listing of Vendors contained in the Web Work database.
- Click on the NEW button  at the bottom of the screen.
- Enter the Company, Name, address, phone, fax, contact, URL and email address into the applicable fields.
- Click the SAVE button  at the bottom of the screen. The new Manufacturer will appear in the Manufacturer listings.

5.1.13. Location Records

Location codes are used to identify operating locations. To add Location records click on the LOCATIONS module button  on the left hand side of the screen.

5.1.14. Location Type Codes

The Location Type further defines a location. The Location Type may be very useful when reporting on Locations and grouping them by type.

- To add Location Types:
- Click on the QUERY button  beside the Equipment Type field while in the Equipment module to display a listing of Equipment Types contained in the Web Work database.
- Click on the NEW button  at the bottom of the screen.
- Enter the EQ Type code and Description in the applicable fields.
- Click the SAVE button  at the bottom of the screen. The new Equipment type will appear in the EQ types listings.




Example Codes: FLD Field
 WAR Warehouse

PRK Park

5.1.15. Location Status Codes

The Location status code indicates the status of a location.

To add new Location Status codes:




- Click on the **QUERY** button  beside the Location Status field while in the Location module to display a listing of Status codes contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Location Status codes and Description in the applicable fields.
- Click the **SAVE** button  at the bottom of the screen. The Location Status will appear in the Location Status listings.

Example Codes: CLS Closed
 UND Under Construction

5.1.16. Issue Unit Codes

Issue Units are the units which inventory items are issued.

To add new Issue Unit Codes:



1. Click on the **QUERY** button  beside the Issue Unit field while in the Inventory module
2. to display a listing of Issue Units contained in the Web Work database.
3. Click on the **NEW** button  at the bottom of the screen.
4. Enter the Issue Unit Code and Description into the applicable fields.
5. Click the **SAVE** button  at the bottom of the screen. The new Issue Unit will appear in the Issue Unit listings.


Example Codes: BX Box
 DZ Dozen
 EA Each

5.1.17. Category Codes

Category codes are used to define Inventory Items.

To add new Category Codes:

- Click on the **QUERY** button  beside the Category field while in the Inventory module to display a listing of Categories contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Category and Description into the applicable fields.



- Click the **SAVE** button  at the bottom of the screen. The new Issue Unit will appear in the Categories listings.

Example Codes: BEAR Bearings
 CONN Connectors

5.1.18. Storeroom Codes

Storerooms are where inventory items are located, purchased for and received to.

To add new Storeroom Codes:




- Click on the  **OPERATIONS** button while in the Inventory module and select Add New Storeroom from the drop down menu.
- Enter a Storeroom code and Description
- Click the **SAVE** button  at the bottom of the screen. The new Storeroom appear in the Storeroom Listings.

Example Codes: MAIN Main Storeroom
 ELEC Electrical Storeroom

5.1.19. Purchase Order Status Codes

PO Status codes are used to show the status of a Purchase Order.

To add PO Status codes:

- Click on the **QUERY** button  beside the Status field while in the Purchasing module to display a listing of PO Status's contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the PO Status code and Description into the applicable fields.
- Click the **SAVE** button  at the bottom of the screen. The new PO Status will now appear in the PO Status listings.

Example Codes: PEND Pending




5.1.20. Vendor Codes

Vendor codes are the identifiers of those companies who supply parts, materials or labour to an organization. For information on adding vendor codes see the Inventory and Purchasing sections of this manual.

5.1.21. Purchase Unit Codes

Purchase Units are the units by which inventory items are purchased. Purchase unit codes are added in the Add Line Items screen of the Purchasing module.

To add new Purchase Unit Codes:



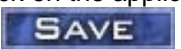
- Click on the **QUERY** button  beside the Purchase Unit field while in the Purchasing module to display a listing of Purchasing Units contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Purchasing Unit Code and Description into the applicable fields.
- Click the **SAVE** button  at the bottom of the screen. The new Purchase Unit will now appear in the Purchase Units listings.

Example Codes:	CAS	Case
	BOX	Box
	TON	Ton

5.1.22. Ship To/Bill To Codes

Ship To/Bill To codes are created in the Purchasing Module. Once Ship To/Bill To Codes and addresses are setup in the Web Work database, this information can be added to a purchase order quickly and easily.



To add Ship To/Bill To Codes:


- Click on the **QUERY** button  beside the Ship To or Bill To field while in the Purchasing module to display a listing of Ship To or Bill To codes contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Ship To/Bill To information into the applicable fields.
- If you wish this information to be used as the default Ship To/Bill To information click the applicable box.
- If you are setting up a Ship To code and wish this information to also be the Bill to address click the applicable checkbox. Conversely, if you are setting up a Bill To code and wish this to also be the Ship To information click on the applicable check box.
- Click the **SAVE** button  at the bottom of the screen. The new Ship To/Bill To Information has been saved to the Web Work database.

5.1.23. Terms Codes

Terms codes are created in the Purchasing Module. Once Terms Codes are setup in the Web Work database, this information can be added to a purchase order quickly and easily.

To add Terms Codes:

- Click on the **QUERY** button  beside the Terms field while in the Purchasing module to display a listing of Terms codes contained in the Web Work database.
- Click on the **NEW** button  at the bottom of the screen.
- Enter the Terms information into the applicable fields.
- If you wish this information to be used as the default Terms click the applicable box.

- Click the **SAVE** button  at the bottom of the screen. The Terms code you added has been saved to the Web Work database.

5.1.24. Employee/Requester Codes

Employee and Requester codes are entered in the Labour module. See the Labour module section of this manual for information on adding these codes.

5.1.25. Work Order Status Codes

Web Work status codes are setup in the Admin module under Resources. See the Admin module section of this manual for more information on setting up Work Order Status Codes.

5.1.26. GL/Acct Codes

Web Work GL/Acct codes are setup in the Admin module under Resources. See the Admin module section of this manual for more information on setting up GL/Acct Codes.

5.1.27. Fault Codes

Web Work fault codes are setup in the Admin module under Resources. See the Admin module section of this manual for more information on setting up Fault Codes.